HelpBox
End User Guide

Contents

1. OVERVIEW

The HelpBox product is an Internet-based issue tracking system that the FSSA Technology Services Team (FTST) uses to record, manage, and resolve issues that occur with multiple software applications, processes, and procedures.

Previously, you used the DDRSDATA email address exclusively to log a help request or report an issue. Now, the FTS is converting issues to the HelpBox format. This end user guide is designed to provide you with clear written instructions that you can use to:

- Perform administrative functions, such as logging in and setting up the system for optimum use.
- Use the HelpBox product to log and manage help desk requests.

2. ADMINISTRATION

This section describes how to:

- Access the HelpBox product.
- Register yourself as a user.
- Log in to the HelpBox product.
- Change your password.
- Change your user account information.

2.1 How to Access the HelpBox Product

Important

The HelpBox product requires that you use the Internet Explorer browser that is available on computers that run Microsoft products. Do NOT attempt to access the HelpBox product by using a different Internet browser such as Firefox or America Online, as a successful login cannot be guaranteed.

The Internet URL required to access the HelpBox product varies according to your user setup:

State User

If your computer is State-owned and you work through the State network,

-Or-

If you work through the State network on a non State-owned computer,

Select the following link or enter the URL in the **Address** field of the Internet Explorer browser:

https://admin.fssa.in.gov

Non-State User

If your computer is NOT State-owned and you do NOT access the State network,

Select the following link or enter the URL in the **Address** field of the Internet Explorer browser:

https://admin.fssa.in.gov/LaytonHelpBoxSQL/loginenduserseparate.asp

After you select the appropriate link or enter the appropriate URL in the Internet Explorer browser, the **Welcome to HelpBox** screen appears.
If you used the **State User** access method, select the **End user** icon.

- If your computer is State-owned and you work through the State network, you should have already been registered and should immediately access the system.
- If you work through the State network on a non State-owned computer, you should have already been registered and will be prompted to log in.

  If you meet one of the previous criteria, but have NOT been registered, a message will appear indicating that you must register yourself.

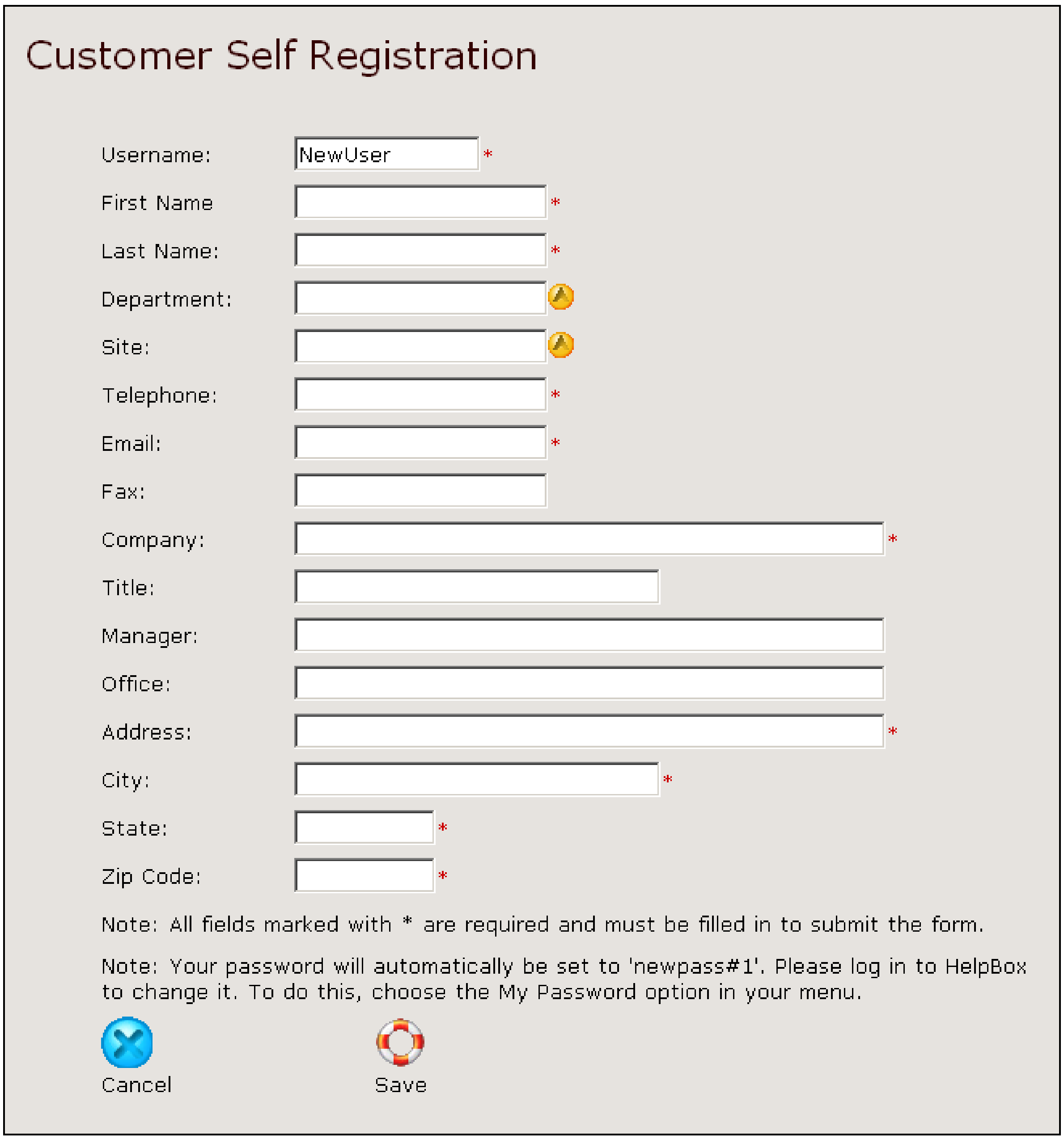
If you used the **Non-State User** access method, you must register yourself.

2.2 (First Time Users) How to Register Yourself as a User

If this is your first time using the HelpBox product and you meet one of the following additional criteria, follow the steps to register yourself as an end user:

- You used the **State User** access method and the system indicated that you are not registered
- You used the **Non-State User** access method

1. Select the **Register End User** button on the **Welcome to HelpBox** screen to display the **Customer Self Registration** form. The following illustration shows the **Customer Self Registration** form:



Customer Self Registration

Username: NewUser *

First Name *

Last Name: *

Department:

Site:

Telephone: *

Email: *

Fax:

Company: *

Title:

Manager:

Office:

Address: *

City: *

State: *

Zip Code: *

Note: All fields marked with * are required and must be filled in to submit the form.

Note: Your password will automatically be set to 'newpass#1'. Please log in to HelpBox to change it. To do this, choose the My Password option in your menu.

Cancel

Save

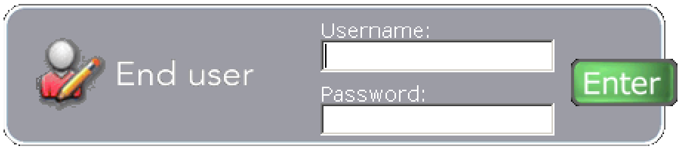
2. Use the information in the following table to complete the fields in the **Customer Self Registration** form:

Customer Self Registration Fields and Buttons

Field or Button	Description
Username	Replace **NewUser** with your last name followed by your first and middle initials (if you have a middle initial) as one name (for example, **JonesRL** or **SmithK**). You will use this name in the **Username** field when you log in.
First Name	Enter your first name.
Last Name	Enter your last name.
Department	(Optional) Select the gold up arrow button in this field to display a list of available departments. If you do not see your department on the list, select **Next** to move to the next page. Repeat as necessary until you locate your department name.
Site	(Optional) Select the gold up arrow button in this field to display a list of available sites. Select **Next** as necessary to move to the next page. Repeat until you locate your site name. If your site is not listed, select **Other**.
Telephone	Enter your work telephone number in the **###-###-####** format.
Email	Enter your work email address.
Fax	(Optional) Enter your work fax number in the ###-###-#### format.
Company	Enter the name of the company where you work.
Title	(Optional) Enter your job title.
Manager	(Optional) Enter the name of your manager or supervisor.
Office	(Optional) Enter the name or location of your office (for example, to distinguish it from other offices in the company).
Address	Enter the office address or an address where you can be reached if you do not work in an office.
City	Enter the city name for the address in the Address field.
State	Enter the two-letter state code for the address in the Address field.
Zip Code	Enter the postal code for the address in the Address field.
Save	Select the **Save** button to save the changes and create the end user account. The system logs you in and displays the contents of the **Customer** menu. If a required field is empty when you select **Save**, the system displays an alert message and a **Back** button so that you can return to the form.
Cancel	Select the **Cancel** button to cancel the registration, discard your changes, and return to the welcome screen.

2.3 How to Log in to the HelpBox Product

If your computer is outside of the State network, the system displays login fields similar to the following example when you attempt to access the HelpBox product:



1. Enter your user name in the **Username** field (use your State computer login if you are working through the State network).
2. Enter **newpass#1** in the **Password** field (unless you have changed your password).
3. Select **Enter**.

2.4 How to Change Your Password

After you log in to the HelpBox product, you should change the default password for your account to a unique password of your choosing. To change your password, use the following steps:

1. Select **My Password** from the **Customer** menu.
2. Enter the old password in the **Old password** field.
3. Enter a new, unique password in the **New password** and **Confirm new password** fields.
4. Select **Save**.

   The system sends a confirmation email to your email address.

2.5 How to Change Your User Account Information

You can change your account information by using the following steps:

1. Log in to the HelpBox product.
2. Select **My Details** from the **Customer** menu.
3. Change one or more fields in the **Customer Self Registration** form that appears.
4. Select **Save**.

3. USING THE HELPBOX PRODUCT

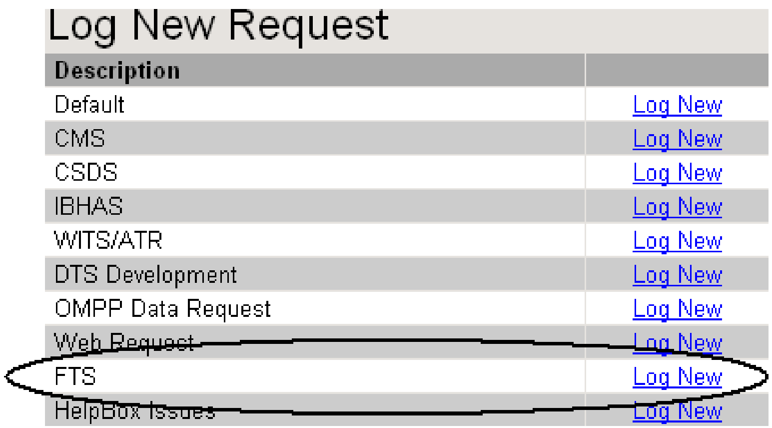
This section describes how to:

- Log a new request
- Manage requests
- Search for a solution to an issue

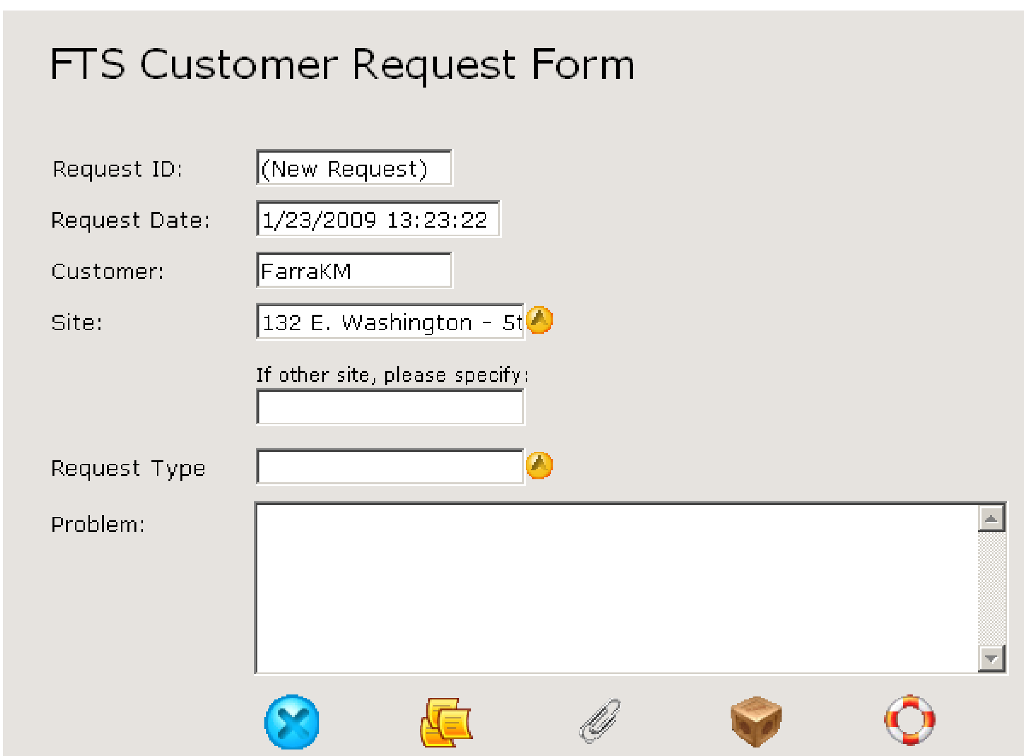
3.1 How to Log a New Request

When you encounter a problem or have a question about an FTS-related product, process, or procedure, you must log a request through the HelpBox product so that the FTST can assign, track, and ultimately resolve the issue. The following procedure describes how to log a new request:

1. Select **Log New Request** from the **Customer** menu.
2. Select **Log New** for the FTS row in the **Log New Request** screen, as shown in the following illustration:



The **FTS Customer Request Form** appears, similar to the example shown in the following illustration:



3. Use the information in the following table to complete the **FTS Customer Request Form**:

FTS Customer Request Form Fields and Buttons

Field or Button	Description
Request ID	Cannot change – the system automatically generates the request ID.
Request Date	Cannot change – the system automatically generates the request date and time.
Customer	Cannot change – the system automatically generates the customer name.
Site	Select the gold up arrow button in this field to display a list of available sites. If you do not see your site on the list, select **Next** to move to the next page. Repeat as necessary until you locate your site name. If your site is not listed, select **Other** and then enter the location in the field labeled **If other site, please specify**.
Request Type	Select the gold up arrow button in this field to display the **Request Type** form. Use the decision tree that appears to locate the request type that best describes your issue. Click the Plus sign (+) to expand an item, and the Minus sign (**-**) to collapse an item while searching the decision tree. Follow the decision tree as far as possible to be as specific as possible when you select a blue link. For example, selecting **FTS / Applications / Citrix** is much more descriptive than selecting only **FTS / Applications**.
Problem	Describe the problem as thoroughly as possible.
Cancel button 	(Optional) Select the **Cancel** button to cancel the operation, discard your changes, and return to the Requests screen.
Comments button 	(Optional) Select the **Comments** button to add a comment to the request. The Manage Comments screen appears. To add a comment, use the following steps: 1. Select the **Add New** button . The Edit Comment screen appears. 2. Enter the text of the comment in the Comment field. The system automatically populates the other fields on the screen. 3. Select the **Save** button. The system returns to the Manage Comments screen. 4. Select the **Back** button  to return to the FTS Customer Request Form.

FTS Customer Request Form Fields and Buttons

Field or Button	Description
Attachment button 	DO NOT USE – The FTST recommends that you avoid using this button to attach a document to a request. Instead, please send an email to the DDRSDATA email address with the attachment.
Change Request Status button 	DO NOT USE **-** This button is not available for end users. Only the analyst assigned to review a request can change the status of the request.
Save button 	Select the **Save** button to save the request. If all required fields have been completed, the system displays the new request on the Request screen. If a required field is empty when you select **Save**, the system displays an alert message and a **Back** button so that you can return to the form.

3.2 How to Manage Requests

To manage requests, you can use the following menu items from the **Customer** menu:

My Open Requests
Select this menu item to display the requests that you have logged and which remain open. An open request is a request that is either being worked on by an analyst or remains unassigned to an analyst. When a request is assigned to an analyst, the system sends you an email.

My Closed Requests
Select this menu item to display the requests that you have logged and which have been closed by an analyst. When a request is closed by an analyst, the system sends you an email.

All My Requests
Select this menu item to display all of the requests that you have created. This view displays both open and closed requests.

3.3 How to Search for a Solution to an Issue

In addition to creating and managing requests, you can also use the HelpBox product to search for a solution to an issue, which would negate the need to create a request. For example, before logging a request because you cannot log in to the CORM product, you could search the solution database and locate one or more solutions to this issue. The following tutorial uses this situation as an example.

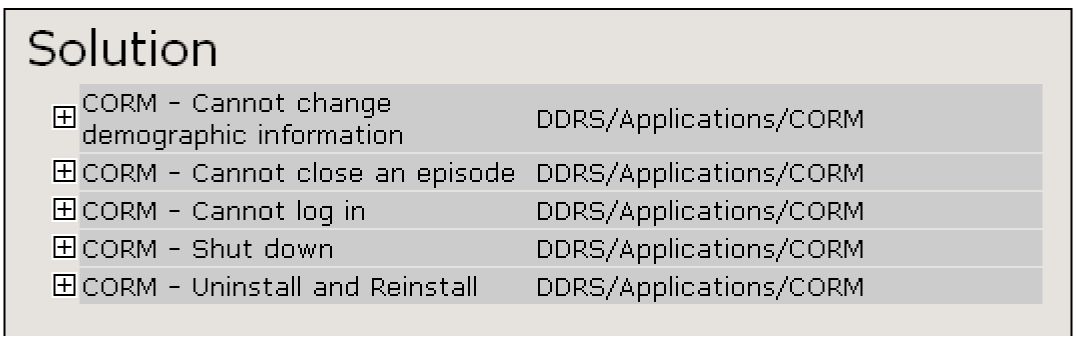
TUTORIAL: Searching for a Solution to an Issue

The following tutorial describes how to search for and display the solution when you cannot log on to the CORM product.

1. Select **Self Service** from **Customer** menu. The Search Solution Database screen appears.
2. Select the gold up arrow button in the **Request Type** field to display the **Request Type** window.
3. Select the plus sign (+) next to the following folders to open the folders:

   FTS > Applications

4. Select **CORM** from the **Applications** folder. The **Request Type** window closes and the full filename appears in the **Request Type** field.
5. Select the **Search** button. The solution screen appears and displays the CORM related solutions, as shown in the following illustration:



6. Select the plus sign (+) next to **CORM – Cannot log in** to display the solution. The problem description and solution description appear. Notice that the solution description contains a hypertext link.

7. Select the link in the **Link 1** field to display the PDF file.

Important

If you do not have a PDF reader (for example, Adobe Acrobat Reader), you cannot view the PDF file.

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8. Close the PDF viewer.